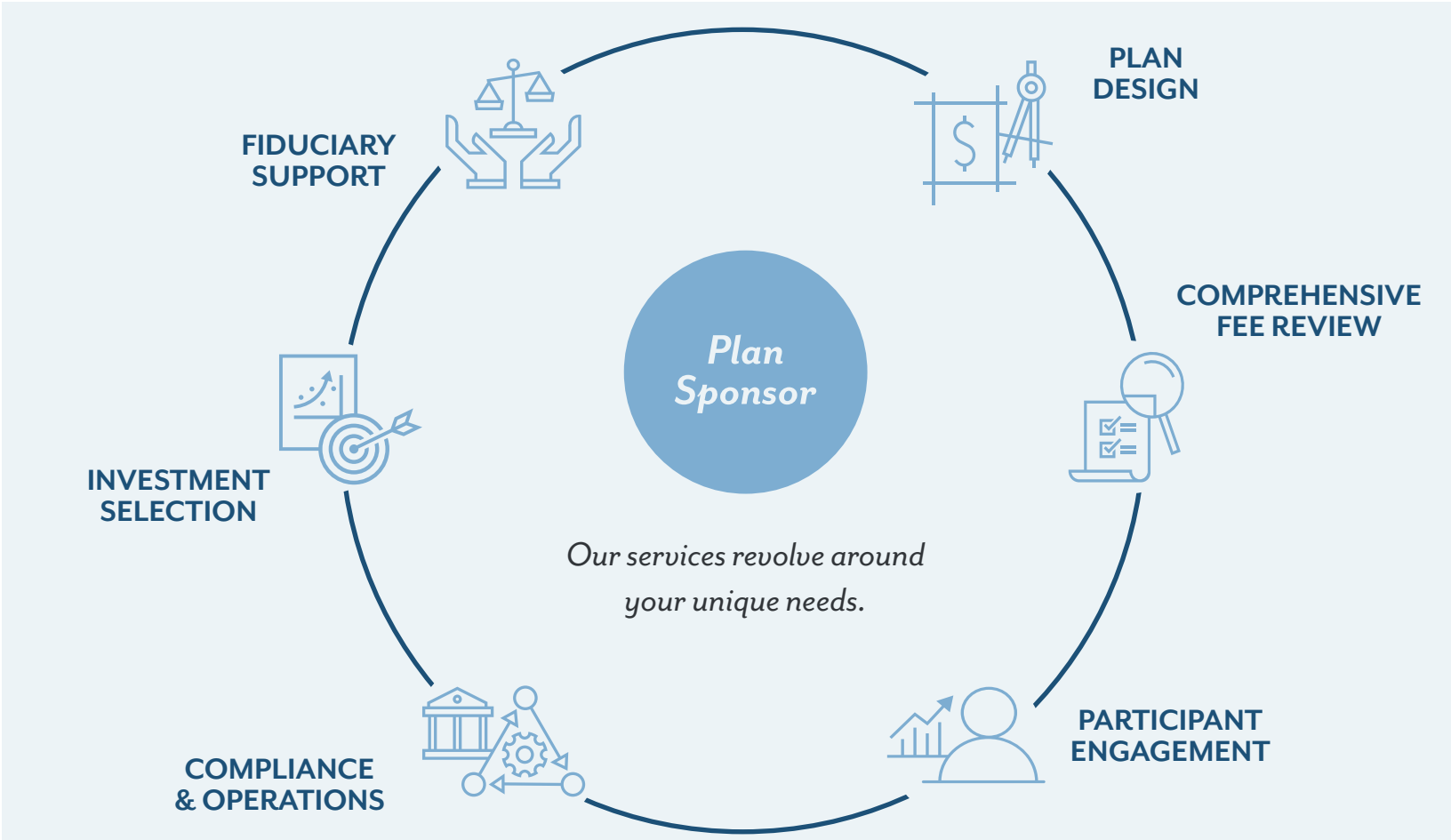
Lawley

RETIREMENT ADVISORS

How Can We Help You?

Redefine Retirement Plan Success

Lawley Retirement Advisors helps you navigate the complexities of retirement plans. We provide solutions and support where you need it most.



There's no better time than now to talk to Lawley Retirement Advisors.

lawleyretirement.com | 855.841.1135 | info@lawleyretirement.com

Lawley Retirement Advisors, LLC is registered with the SEC as an investment adviser; however, such registration does not imply a certain level of skill or training and no inference to the contrary should be made. Additional information about Lawley Retirement Advisors, LLC is also available on the SEC's website at www.adviserinfo.sec.gov. Securities offered through Cadaret, Grant & Co., Inc., Member FINRA & SIPC. Lawley Retirement Advisors is not a subsidiary or control affiliate of Cadaret, Grant & Co., Inc.

Services To Help Simplify & Improve Your Retirement Plan

Fiduciary Support | *Understanding and mitigating your risks*

- Act as a 3(21) investment advisor
- Comprehensive plan reviews and assistance with committee functions, including by-laws, charters and board resolutions
- Timely legislative and compliance updates
- Provide fiduciary education for plan sponsor and committee members

Plan Design | *Evaluating your plan*

- Evaluation of your current plan and options
- Structure plan features to improve participation
- Guidance on enrollment, eligibility & distribution options
- Strategies to optimize employer contributions

Comprehensive Fee Review | *Full fee disclosure*

- Evaluate provider fees and services
- Plan benchmarking services
- Request for Proposal (RFP) services
- Fee transparency & equalization

Investment Selection and Monitoring | *Benchmarking results*

- Education on available investment options for plan sponsors
- Choice of Target Date fund and qualified default investment alternative (QDIA) solution process
- Investment menu performance and watch list due-diligence
- Communicating in-depth knowledge of current market trends

Plan Compliance & Operations | *Keeping you up to date with the latest legislation*

- Monitor plan trends- participation rates, contribution levels and demographics
- Prepare and review Investment Policy Statement
- Assistance with fee disclosure requirements
- Help with creating employee communication

Participant Engagement | *Optimizing your employees utilization of your retirement plan*

- Facilitate employee education and enrollment meetings
- One-on-one participant sessions
- Financial Wellness programs designed around 'retirement readiness' and financial literacy

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LAWLEY RETIREMENT ADVISORS | *Retirement Plan Counsel*
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